Capital Markets CRM for a new era

- CLIENT ENGAGEMENT INTELLIGENCE
- REVENUE-DRIVING INSIGHTS

Singletrack Edge is a transformational capital markets CRM platform incorporating data analysis tools that enable sell-side firms to monitor, manage and plan revenue generating activities on a closely integrated, cross-departmental basis.
Designed by capital markets professionals from a sell-side business perspective for an increasingly competitive and regulated environment, the focus is on delivering maximum visibility and control, with the flexibility to meet each firm’s specific requirements.

**Key questions answered**

- Which accounts should we be focused on?
- What impact is our research product having?
- How can we improve communication and collaboration?
- How do we quantify service levels per client?
- How can we keep up with industry regulations?
- How do we extract more value from our data?

*Everyone understands what’s what, who’s covering who, who’s talking to who.
Singletrack keeps everyone on the same page*
Competitive edge

Singletrack Edge is a flexible on-demand platform that enables sell-side firms to leverage their sales, research and corporate assets to maximise returns in an increasingly competitive environment.

Singletrack can be implemented in weeks to make buy-side client engagement more productive, research distribution more focused and client service reporting more comprehensive.

Best practice

An inflexible, poorly implemented CRM system typically leads to a downward spiral of low-level usage, low quality data and low, if any, business value.

Singletrack Edge is backed by a set of revenue oriented best practice recommendations. This covers high level strategic business processes which can be optimised via Singletrack (e.g. running an IPO, maximising performance in an industry survey) together with guidelines for system setup and configuration. In addition, internal cultural and organisational recommendations are offered to make the optimum success of implementation and adoption.

Staying ahead

Sell-side firms face many changes, including increasingly demanding regulation and a constant flow of new technology issues.

Singletrack already addresses the emerging European research procurement regulations as all client-facing activities are logged, including calls, meetings, roadshows and research access so users are fully-equipped to meet their, and their clients’, reporting requirements.

As an on-demand solution based on the world’s premier cloud operating platform, Singletrack already exploits a wide range of mobile and digital delivery technologies.
Revenue-driving intelligence

The Singletrack Edge platform helps align internal resources, prioritise key opportunities, engage persuasively with investors and corporates, measure each interaction, comply with relevant regulations and ultimately monetise client services in the most comprehensive way.

Connected

A well designed, implemented and utilised customer relationship system facilitates a tightly connected organisation where visibility is global and overall control is centralised.

Work in progress is constantly under assessment, priorities identified, analysis before action. Dashboards are built for every situation and full visibility of past outcomes and current events provide valuable intelligence for planning and business development.

Return on investment

- Increased votes, orders and commissions
- Enhanced allocations in primary deals
- Increased staff productivity
- Headcount reduction or reallocation
- Minimum revenue leakage
Singletrack Capital Markets CRM

A 360° view of investor relationships
Maximum front-office productivity
Easy to use - High Adoption
Call lists with click-to-dial

Reporting on Activities, Orders, Revenues
Internal Research Library
Roadshows and Bookbuilding

Singletrack Research Distribution

Increased research readership
Live metrics, flexible security
Distribute documents, audio, video
Profile investors by interest

Email, web, tablet, mobile
Real-time readership metrics
Block unwanted document sharing

Singletrack Edge in summary

- Proven in use with leading capital markets firms
- Flexible & customizable; a best practice solution for the sell-side
- Fast implementation; zero IT infrastructure
- Platform evolving to embrace new technology
- World class security & resilience